

ESG STREET OUTREACH DATA ENTRY WORKFLOW

1. INITIAL CONTACT

- a. Meet with/observe the client and collect as much information as you can.
 - i. Name, gender, race, current location, Current Living Situation can be collected, and can be checked/confirmed during engagement.
 - ii. Naming Convention – A code name can be used to enter and track observed clients.
 1. First Name – Put the initials of your organization (ex. BCCS) before the client's first name if they do not provide their full name. If client's first name is not provided, First Name field will be an observed descriptive characteristic.
 - a. Examples: BCCS Thomas / BCCS RedCap
 2. Last Name – Put the initials of your organization (ex. BCCS) before the client's last name if they do not provide their full name. For observed clients, Last Name field will be their location or time of observation.
 - a. Examples: BCCS WilmingtonRiverfront / BCCS 062920211238PM

2. ENGAGEMENT

- a. Complete all necessary intake paperwork.

CMIS DATA ENTRY

3. BACK DATE MODE

- a. Set Back Date Mode to date and time of the client's initial contact or observation.

4. CLIENTPOINT – SEARCH

- a. Search for client by their name or using your organization's initials. Those who do not have a profile will need one created.

5. CLIENT PROFILE

- a. Enter/review and update client's Universal Data Elements (UDEs).

6. HOUSEHOLDS

- a. Check that all household members being served by Street Outreach team are found in the same household. If not, add additional household members now.

7. RELEASE OF INFORMATION (ROI)

- a. Add Release of Information for all household members under the Parent Provider (Brandywine Counseling) for three years.

8. ENTRY/EXIT

- a. All clients, including observed clients, must be enrolled in a Street Outreach project to be counted.
- b. Select all household members that are being enrolled by Street Outreach.
- c. Add an Entry/Exit under the specific project the client is being served by, determined by funding source and location.

- d. Review and update all questions on the Entry Assessment that have been answered during contact or observation.
 - i. A new Current Living Situation should be entered for every contact had with the client.
 - ii. All Entry Assessment questions must be completed before or at the Date of Engagement.
9. **DURATION OF PROGRAM ENROLLMENT**
 - a. Case Management tab – add clients' case manager
 - b. Case Plans tab – upload files relating to clients' case management.
 - c. Interims – record updates/changes in a client's information throughout their program enrollment.
10. **PROJECT EXIT**
 - a. Clients are to be exited from the Street Outreach program when they stop receiving services or are not in contact with Street Outreach after 30 days.
 - i. Select all household members exiting the project.
 - ii. Select the Reason for Leaving and Destination that best reflects the client's situation.
 - iii. Update the Exit Assessment with any information not collected at Entry or through an Interim.